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Foreign CROPS AND MARKETS



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FOR RELEASE

MONDAY

MAY 29, 1950

UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

L A T E N E W S

Prices for wool at the close of the London Auctions May 19, 1950, reached an all-time high for some grades in sterling currency even though the wool offered was of inferior quality, compared with earlier offerings.

Comparative prices for the auction just closed and the sale closing May 27, 1949, indicate outstanding gains in sterling currency with the largest gains being made in the coarser grades. Sixty-four seventies (64's/70's) good medium fleece closed at 158d at this year's May auction compared to 120d last year; 56's fine crossbred closed at 98d compared to 59d; and 46's crossbred closed at 69d compared to 33d.

A comparison of dollar prices shows that costs have not as yet increased to the full amount of devaluation for the finer grades but have increased more than the amount of devaluation for medium and coarse grades. Dollar prices for the above descriptions were \$1.84 May 1950 closing compared to \$2.01 May 1949 closing, \$1.14 compared to \$.99, and \$.79 compared to \$.55, respectively.

FOREIGN CROPS AND MARKETS

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WORLD RICE PRODUCTION DECLINES IN 1949-50

The world rice harvest for 1949-50 (August-July) is estimated at 334,000 million pounds of rough rice, 3 percent less than the postwar high of 343,000 million pounds in the year before, according to the Office of Foreign Agricultural Relations. Most of the decline occurred in Asia, with a moderate decrease in Africa. Record crops were harvested in Europe, North America, and South America.

Asia's rough rice harvest, representing 92 percent of the world total, is estimated at 308,000 million pounds or about 10 million pounds less than in the preceding year. China's crop was the smallest in several years. Rebel activities in Burma and Indochina caused a decrease in the acreage and output, and slight declines occurred in Pakistan and Korea. Production was larger in the Philippines, Thailand, Malaya, Taiwan, and Japan.

July floods in China resulted in a pronounced decline in the harvest, estimated at 98,000 million pounds of rough rice from 45,630,000 acres. This compares with 106,000 million pounds in the preceding year on approximately the same acreage. Before the war production and acreage averaged (1931-37) 110,000 million pounds and 48,850,000 acres, respectively.

The official estimate of production in India's reported areas is 73,693 million pounds, a slight gain over 73,061 million in the year before. The acreage is officially reported at 71,660,000 acres, an increase of 2 percent from a year earlier. Changes in the reporting basis of some areas of India added about 10 million acres formerly not reported, so that current statistics are not comparable with those reported prior to 1948-49. In most of India's producing areas, weather conditions were favorable with the exception of Madras where crops were damaged by the failure of the northeast monsoon.

The rough rice production of Asia's surplus area--Thailand, Burma, and Indochina--is estimated at 33,000 million pounds, a reduction of 1,800 million from the preceding year, and 7,000 million less than the prewar average. Burma's acreage fell 21 percent, or 2,070,000 acres below 1948-49, and production was 16 percent less. The crop is estimated at only 57 percent of the prewar average.

In Indochina, conditions similar to those in Burma indicate acreage and production have been declining since 1947-48. The 1949-50 crop estimate is 84 percent of the prewar average.

Thailand is the only country in this area where production has continued to increase since the war, and indications are the harvest was above the prewar average. The reported acreage increased in 1949, despite lack of rain which delayed planting, and favorable growing weather resulted in another bumper crop. The official estimate of production is 11,850 million pounds of rough rice.

RICE, ROTH: Acreage, yield per acre, and production in specified countries,
average 1935-36 to 1944-45, annual 1947-48 to 1949-50 1/2

Continent and country	Acreage			Yield per acre			Production		
	Average			Average			Average		
	1935-36 to 1939-40	1940-41 to 1944-45	1945-46 to 1949-50	1935-36 to 1939-40	1940-41 to 1944-45	1945-46 to 1949-50	1935-36 to 1939-40	1940-41 to 1944-45	1945-46 to 1949-50
	acres	acres	acres	Pounds	Pounds	Pounds	Million pounds	Million pounds	Million pounds
NORTH AMERICA									
El Salvador.....	26	45	48	1,212	1,027	1,369	31.5	46.2	69.3
Mexico.....	95	179	210	1,898	1,547	1,764	180.3	239.8	303.8
Panama.....	50	79	128	1,440	1,320	1,240	72.0	104.3	134.4
United States.....	1,004	1,338	1,781	2,234	2,046	2,080	2,243.3	2,738.2	3,827.5
Cuba.....	45	69	120	964	1,035	1,098	43.4	71.4	129.0
Dominican Republic.....	80	98	114	1,062	1,204	1,217	85.0	107.7	123.7
Total.....	1,421	1,943	2,430	2,630	2,170	2,170	2,800.0	3,511.0	4,970.0
EUROPE									
Bulgaria.....	19	28	-	2,465	2,361	-	46.8	66.1	-
France.....	1	1	-	1,400	1,600	2,125	1.4	1.6	22.0
Greece.....	5	3	9	1,840	2,100	2,014	9.2	6.3	19.8
Italy.....	362	381	326	4,677	4,310	4,720	1,692.9	1,642.0	1,843.5
Portugal.....	47	60	68	3,253	2,847	2,917	152.9	170.8	202.0
Spain.....	110	121	137	4,336	4,314	3,782	47.0	52.0	518.1
Total (excl. U.S.S.R.).....	553	615	630	-	-	-	2,331.0	2,443.0	2,381.0
U.S.S.R. (Europe and Asia).....	3/	3/	3/	1,901	1,901	1,901	3/	697.5	675.0
ASIA									
Iran.....	534	580	544	1,566	1,638	1,418	836.0	990.0	702.2
Iraq.....	3/	479	-	1,303	1,400	1,499	902.9	670.7	573.2
Turkey.....	66	86	59	2,754	2,662	3,453	234.8	175.7	121.3
Burma.....	12,671	10,650	7,849	1,238	1,162	1,311	15,683.3	12,375.0	10,702.0
China.....	44,853	45,373	45,617	2,259	2,200	2,260	110,372.0	99,000.0	102,529.6
Taiwan.....	1,616	1,539	1,782	2,387	2,120	1,977	3,856.7	3,262.7	3,225.0
Manchuria.....	782	975	-	1,829	1,585	-	1,430.2	1,545.1	1,028.2
India - reporting.....	5/	5/	70,275	71,660	-	1,040	1,028	5/	73,061.2
India - non-reporting.....	5/	5/	1,313	-	-	1,555	2/	5/	2,041.3
India - total.....	5/	5/	(71,588)	(72,973)	-	(1,049)	(1,036)	5/	(75,102.5)

ASIA (Continued)

French Indochina.....	14,306	13,000	12,900	13,500	12,000	1,006	987	1,012	950	1,012	14,336.0	12,325.0	13,050.0	12,825.0	12,150.0
Pakistan.....	948,706	20,605	21,100	21,545	21,756	5/	1,227	1,187	1,315	1,245	5,044,339.8	25,274.3	25,044.3	28,340.0	27,082.2
Japan.....	7,862	7,653	7,830	7,850	7,850	3,408	3,487	3,180	3,356	3,546	26,739.1	25,603.9	24,902.8	26,343.1	27,877.9
Java and Madura.....	9,794	9,330	9,000	9,555	-	1,439	1,468	1,376	1,400	-	14,091.5	13,380.0	12,380.0	13,380.0	13,380.0
Korea.....	3,838	3,601	2,753	2,748	2,580	2,295	2,269	2,157	2,826	2,649	8,809.3	8,172.0	5,939.2	7,764.9	6,634.5
Malayan Union.....	746	790	862	907	920	1,635	1,424	1,368	1,204	1,946	4,219.5	1,125.0	1,179.3	1,092.2	1,422.2
Philippine Islands.....	4,852	5,265	5,007	5,347	5,486	973	940	987	1,027	1,041	4,719.5	4,950.0	4,940.2	5,492.3	5,711.4
Thailand.....	7,028	6,750	6,800	7,500	7,900	1,353	1,333	1,522	1,500	1,500	9,588.5	9,000.0	10,150.0	11,250.0	11,890.0
Total (excl. U.S.S.R.).....	-	-	-	208,620	207,200	-	-	-	-	-	-	-	-	513,131.0	109,304.0
SOUTH AMERICA															
Argentina.....	52	91	128	124	136	2,692	2,795	1,953	2,137	1,838	140.0	254.3	250.0	265.0	256.0
Brazil.....	2,323	3,042	4,106	4,152	-	1,287	1,409	1,371	1,301	-	2,989.1	4,285.7	5,631.3	5,400.0	6,200.0
British Guiana.....	70	83	107	95	-	2,289	2,199	2,002	2,212	-	160.2	182.5	214.2	210.1	210.1
Chile.....	13	68	70	60	66	4,500	3,416	2,816	3,065	3,045	58.5	232.3	197.1	183.9	201.0
Colombia.....	-	-	-	-	-	-	-	-	-	-	141.4	267.2	460.4	580.0	580.0
Ecuador.....	-	-	-	-	-	-	-	-	-	-	154.7	294.2	382.2	372.6	372.6
Paraguay.....	5	15	8	16	22	1,760	1,760	2,362	1,931	1,805	8.8	26.4	18.9	30.9	33.7
Peru.....	107	137	139	112	94	1,925	2,206	3,263	2,852	2,766	206.0	302.2	453.6	319.4	280.0
Surinam.....	33	33	38	45	40	2,070	2,545	1,218	2,860	2,755	76.6	84.0	46.3	128.7	130.2
Uruguay.....	13	13	31	36	34	2,992	2,862	2,648	2,619	2,594	38.9	37.2	82.1	94.3	88.2
Total.....	2,914	4,002	5,270	5,350	5,300	-	-	-	-	-	4,003.0	5,964.0	7,803.0	7,582.0	8,133.0
AFRICA															
Egypt.....	463	600	805	816	730	3,233	2,704	3,496	3,534	3,527	1,496.8	1,622.2	2,344.0	2,883.4	2,575.0
French West Africa.....	1,562	1,860	-	-	-	3/	598	-	-	-	942.1	1,111.5	-	-	-
Madagascar.....	1,195	1,227	1,401	1,421	-	1,274	1,278	1,171	1,122	-	1,522.0	1,568.3	1,640.9	1,594.5	-
Sierra Leone.....	46	-	780	780	-	1,192	-	1,074	-	-	412.3	-	306.4	-	-
Total.....	4,326	5,413	7,180	7,110	7,330	-	-	-	-	-	5,065.0	5,851.0	8,295.0	8,370.0	8,247.0
OCEANIA															
Australia.....	23	30	26	31	34	4,134	3,693	4,323	3,710	3,806	95.3	110.8	112.4	115.0	129.4
Fiji.....	10	22	-	-	-	1,940	2,059	-	-	-	19.4	45.3	-	-	-
Total.....	40	72	85	90	95	-	-	-	-	-	122.0	176.0	230.0	230.0	258.0
World total.....	-	-	-	225,050	223,700	-	-	-	-	-	-	-	-	-	342,553.0

1/ Crops harvested in Northern Hemisphere countries during the latter part of the year, together with those harvested in Asia principally from November to May, are combined with crops reported in Southern Hemisphere countries during the first part of the following year. 2/ Preliminary. 3/ Less than 5-year average. 4/ Average 1931-37. 5/ Because of changes in the basis of reporting India's rice acreage and production of 1943-49 and 1949-50, statistics for earlier years are not comparable with the official estimates for those years. 6/ Average 1936-37 to 1939-40. 7/ South Korea only. In the 1935-36 period, production averaged about 6,750 million pounds annually.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service Officers, results of Office research, and other information.

The rice acreage of Pakistan increased about 200,000 acres, but unfavorable weather and plant diseases caused a moderate decline in the harvest compared with last year. Good weather in Japan resulted in the largest crop in 20 years. Drought conditions in South Korea during the planting season reduced the acreage 6 percent, but the yield per acre was only slightly less than in the year before.

Production in the Philippines showed a gain of 4 percent from the preceding year's record. Rice acreage has increased steadily since the war, from 4.1 million acres in 1945-46 to 5.5 million acres in 1949-50. Favorable weather in the Malayan Union resulted in a record crop from a record acreage.

Europe's 1949 crop was only slightly larger than in 1948, but well above the prewar average. Its rough rice production is estimated at 2,500 million pounds compared with 2,480 million a year earlier, and 2,400 million before the war. A decline in the rice acreage of Italy was compensated by increases in several countries having small acreages. Rice is now raised in increasing quantities in several countries of Europe where little was grown before the war. France, Greece, Hungary, and Rumania are cases in point.

Spain produced the largest crop in recent years. The area sown to rice in Portugal, however, was the smallest since 1940, and dry weather during the growing season caused an abandonment of several thousand acres. Although the yields per acre were larger than in the year before, a sizable drop occurred in production.

The total rice acreage of France, Greece, Hungary, and Rumania in 1949 is estimated at approximately 90,000 acres, an increase of around 80,000 acres from the average of 10,000 acres during the 5-year (1935-39) period. The combined production of these countries in 1949 is estimated at over 200 million pounds of rough rice compared with slightly over 10 million pounds before the war.

Africa's production decreased, but continued substantially above the prewar average. A decline in Egypt, the largest producer, was the principal factor in the reduction. Acreage declined 11 percent, but the yields per acre were as high as those harvested in the bumper crop of the year before. Madagascar's acreage reportedly is above the preceding year, and climatic conditions so far have been reported favorable. Plans for increasing production are taking shape in several countries of Africa, and the total production of that continent in coming years may show an expansion.

The record rice production of the Western Hemisphere in 1949-50 is estimated at 13,400 million pounds, slightly larger than in the year before, and about double the 6,800 million before the war. Above-average yields were harvested in both Brazil and the United States, whose combined production accounts for three-fourths of the Hemisphere total. The 1949-50 acreage of the Western Hemisphere, estimated at 8 million acres, is only slightly larger than in 1948-49, and compares with 4.3 million during the prewar average period.

North America harvested its sixth successive record rice crop. Production of 5,200 million pounds compared with 5,000 in the year before and 2,800 million before the war. In the United States, acreage was 40,000 acres above the record of the year before, and high average yields were harvested.

Mexico and Panama also again produced record crops. Mexico added nearly 60,000 acres to the preceding year's record. Although the yield per acre was below average, production exceeded 1948-49. Cuba's harvest approximated the 1949 record.

South America's record rice harvest is estimated at 8 percent larger than a year earlier, and more than double the prewar average. Excellent growing weather in Brazil from January through April resulted in the largest crop that country has ever produced. Colombia and Paraguay also had record harvests, and Chile's production exceeded the preceding year.

Although production was down in Argentina compared with the year before, it was 79 percent above the prewar average (1935-36/39-40) and about equal to the wartime average (1940-41/44-45) production. The crops of Surinam and Uruguay also were smaller than in the preceding year, but were well above both the prewar and wartime averages.

Ecuador's 1950 production is forecast at about 35 percent less than in 1949, as the result of reduced acreages and adverse weather in some localities. Peru will harvest a crop even smaller than in 1949. For the second year water supplies are deficient in the main rice-producing areas, and the harvest is expected to be 20 percent below last year's short crop.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of C.M. Purves, Paul E. Quintus, L. Thelma Willahan, and John C. Hobbes.

WORLD BEAN PRODUCTION BELOW LAST SEASON

Dry edible bean production in 52 of the world's most important bean producing countries is estimated at 114 million bags of 100 pounds in the 1949-50 season. This is 2 million bags, or 2 percent, less than the 1948-49 production of 116 million bags, but around 7 million bags, or 6 percent, more than the average production in these countries in the prewar period 1935-39.

ASIA											
Iran.....	385:	410:	500:	500:	312:	317:	280:	1,200:	1,300:	1,400:	1,400
Lebanon.....	2/	2/	7:	7:	2/	2/	1,487:	2/	2/	110:	110
Syria.....	3/	1:1/	245:	3:	1,040:3/	1,151:	1,004:	1,000:3/	59:	27:	50
Turkey.....	185:	227:	245:	300:	751:	843:	834:	1,390:	1,914:	2,043:	1,801
Burma.....	396:	300:	300:	300:	682:	333:	333:	2,700:	1,000:	1,000:	1,000
China.....	6,250:	5,000:	4,000:	4,000:	450:	480:	550:	28,100:	24,000:	22,000:	22,000
Japan.....	450:	344:	179:	180:	746:	749:	796:	3,355:	2,578:	1,424:	1,400
South Korea.....	100:	90:	86:	85:	806:	778:	402:	806:	700:	346:	350
Total.....	7,767:	6,376:	5,320:	5,312:	484:	495:	533:	37,559:	31,551:	28,350:	28,111
SOUTH AMERICA											
Argentina.....	57:	80:	94:	86:	719:	758:	586:	462:	606:	551:	397
Bolivia.....	58:	60:	62:	60:	1,241:	1,333:	1,371:	1,417:	800:	850:	850
Brazil.....	2,405:	2,875:	4,183:	4,200:	746:	717:	635:	643:	20,622:	26,571:	27,000
Chile.....	214:	213:	195:	190:	815:	752:	822:	842:	1,602:	1,602:	1,600
Colombia.....	179:	186:	210:	210:	407:	473:	476:	476:	879:	1,000:	1,000
Ecuador.....	9:	9:	- 10:	10:	778:	833:	1,000:	1,000:	75:	100:	100
Paraguay.....	23:	10:	8:	8:	304:	700:	938:	70:	75:	75:	75
Peru.....	58:	60:	62:	60:	690:	750:	758:	792:	450:	470:	475
Uruguay.....	23:	19:	11:	10:	383:	295:	382:	400:	56:	42:	40
Venezuela.....	30:	90:	105:	100:	867:	556:	761:	820:	500:	820:	820
Total.....	3,056:	3,602:	4,940:	4,934:	734:	712:	649:	656:	25,660:	32,081:	32,357
AFRICA											
Algeria.....	1:	1:	3:	3:	526:	443:	467:	333:	6:	14:	10
Anglo-Egyptian Sudan.....	4:	10:	8:	10:	1,075:	865:	1,125:	1,000:	83:	90:	100
French Morocco.....	2:	9:	15:	21:	265:	295:	693:	648:	25:	104:	136
Madagascar.....	143:	128:	114:	109:	660:	533:	540:	361:	682:	616:	394
Angola.....	127:	132:	150:	155:	448:	489:	882:	939:	646:	1,323:	1,455
Union of South Africa.....	100:	120:	147:	150:	400:	375:	474:	569:	450:	668:	700
Total.....	377:	400:	437:	448:	524:	473:	644:	624:	1,892:	2,815:	2,795
Total, specified countries.....											
19,497: 19,792: 20,656: 20,735: 549: 552: 559: 548: 106,967: 109,338: 115,542: 113,564											
1/ Preliminary. 2/ Included with Syria. 3/ Includes Lebanon.											

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Years refer to year of harvest in the Northern Hemisphere and include the harvest immediately following in the Southern Hemisphere. Averages are for years stated or for the nearest comparable period. Yields have been calculated on basis of unrounded estimates of acreages for countries of small production.

The above estimates exclude, for lack of data, several large producing areas such as the Soviet Union, India, Manchuria, and numerous small areas. Therefore, the 114 million bag production estimated for 1949-50 cannot be considered an estimate of the total world bean crop. However, a sufficiently large proportion of the world crop is included so that the percentage increases and decreases may be considered as indicative of the total world situation.

Bean acreage in the 52 countries in 1949-50 estimated at 20.7 million acres, is 6 percent above the prewar (1935-39) average of 19.5 million and almost the same as the 1948-49 acreage. The 1949-50 average yield of 548 pounds per acre was at about the prewar level for the 52 countries. It was 11 pounds below the average yield of 1948-49 and 4 pounds above the wartime (1940-44) yield of 552 pounds.

In North and Central America, 12 countries reporting, the 1949 crop of 30 million bags is slightly above the preceding year and 41 percent above prewar. The United States and Canada, of course, account for more than two-thirds of the total crop reported for North and Central America. There are now large exportable supplies in the United States from both the 1948 and 1949 crops, and with average growing conditions this year the 1950 crop may add further to the surplus.

The yield per acre has been increasing on this continent, influenced mostly by the preponderant United States production. The average yield in the United States increased from 856 pounds per acre prewar to 898 pounds in the 1940-44 period, 1,014 pounds in 1948, and 1,084 pounds in 1949. Acreage in 1949 of 1.8 million was 3 percent below the 1948 acreage of 1.9 million but was 9 percent above the 1.7 million acres prewar.

In Europe, 16 countries reporting, the 1949 crop of 20.2 million bags was less than the 1948 crop and 15 percent, or 3.4 million bags, below prewar. Bean production has been below prewar in Europe for several years.

Total bean acreage in Europe in 1949 was estimated at 5.3 million acres, the same as last year and 16 percent above the prewar average of 4.5 million acres. The decline of production has resulted from lower yields and not from declining acreages. Yields per acre have declined from 522 pounds prewar to 434 pounds in 1948 and 383 pounds in 1949. Important among the causes for the decline of yields in Europe has been drought in most of the important producing countries.

Bean production in the reporting countries of Asia, except for China, is unimportant compared with production in Europe and North America, and the 1949 estimate for China is too rough for accurate conclusions covering all Asia. The 1949-50 data for South America and southern Africa represent, to a large extent, forecasts of crops only

recently harvested. More reliable figures will be available for these areas this summer or fall after the governments have had opportunity to recheck 1949-50 estimates. However, it is estimated that Brazil alone produced in 1949-50 about 27 million bags or 83 percent of the South American crop. China and Brazil together produced 43 percent of the total production of the 52 countries. This production consists largely of black beans which for the most part are consumed in Brazil and China and do not affect supplies outside the borders of these countries.

Distribution of the supply

The 1949 world production of beans, estimated at 6 percent above prewar, plus known September 1949 stocks in the United States and assuming moderate stocks in other parts of the world, indicates a world supply per capita just about equal to prewar. It has been reported that Turkey has accumulated about 1.6 million bags of exportable beans including 220,000 bags of stocks from the 1948 crop. Production in the 52 countries, plus these known 1948 crop stocks, totals some 120 million bags and is 12 percent larger than the prewar average production of 107 million bags. World population has increased about the same percentage as the over-all bean supply, assuming few or no surplus stocks in the prewar period.

This general statement encompassing many classes and colors of beans produced in 52 countries on every continent fails to explain adequately the bean situation. There are local problems of shortages and surpluses resulting from abnormal distribution of production and a breakdown of international trade.

The increase of world production since prewar has varied widely from continent to continent. Production was up in 1949 from prewar by 41 percent in North America, 44 percent in South America, and 41 percent in Africa, and down by 15 percent in Europe and 25 percent in Asia. These varying shifts by continents are especially important in that they were generally upward in the exporting areas and downward in the importing areas.

To adjust such an abnormal distribution of supplies would require an abnormal volume of international trade. But in recent years the bean trade has been much below normal because of high prices in the exporting countries, the breakdown of trade from behind the Iron Curtain, and the dollar shortage in importing countries.

Trade obstacles aggravated by abnormal distribution of production have resulted in per capita supplies being very short in one area and long in another despite over-all average world supplies.

Low production and below normal imports for several years in much of Europe, together with the 10 percent increase of population since

prewar, have resulted in a very low consumption of beans in these countries for several years. This is reflected in the trade figures for recent years in the following table.

Beans, dry edible: Imports and exports from specified European countries, average 1934-38, annual 1947-49

Country	Average		Annual					
	1934-38		1947		1948		1949	
	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports
	1,000 bags	1,000 bags	1,000 bags	1,000 bags	1,000 bags	1,000 bags	1,000 bags	1,000 bags
Belgium-Luxemburg	1/ 403	1/ 267	175	8	165	18	89	10
France.....	653	130	197	14	462	23	329	139
Greece.....	392	-	194	-	469	-	347	-
Italy.....	829	57	345	-	452	41	285	117
Netherlands.....	35	93	108	7	25	16	17	112
Portugal.....	57	4	248	1	4	143	450	0
Spain.....	90	7	396	-	183	-	104	-
Sweden.....	64	-	2	1	29	2/	49	1
United Kingdom....	1,015	-	610	-	395	-	875	-
Total.....	3,538	558	2,275	31	2,204	241	2,545	379

1/ Includes few broad beans.

2/ Less than 500 bags

The 9 European countries reporting trade in 1949 show prewar total imports of 3.5 million bags annually. This dropped to about 2.5 million bags or less in these countries in 1947, 1948, and 1949. During the same years bean production declined in these countries from 11.8 million bags prewar to 7.1 million in 1947, to 6.8 million in 1948, to 6.3 million in 1949.

A rough calculation made by adding calendar year net imports to the indigenous harvest in that same year for these 9 countries shows that total bean supplies made available in 1947, 1948, and 1949 were 37 percent, 39 percent, and 54 percent, respectively, below a similarly calculated supply for prewar. The bean shortage in a few of these countries may have been partially offset by increased supplies of dry edible peas from increased indigenous pea production. This under-

consumption in Europe, the world's largest import market for beans, has occurred during the same period that American surpluses have accumulated. The current aspect of this problem is reflected in the following table.

BEANS, dry edible: Production in selected areas
averages 1935-39 and 1940-44,
annual 1948 and 1949

Area	1935-39	1940-44	1948	1949
	1,000 bags of 100 pounds			
North America.....	21,410	26,712	29,601	30,131
Western Europe	14,897	12,962	12,799	10,274
Asia (Iran, Lebanon, Syria, Turkey).....	2,598	3,273	3,580	3,361
South America (excluding Brazil).....	4,491	5,038	5,510	5,357
Africa.....	1,977	1,892	2,815	2,795
Total.....	45,373	49,877	54,305	51,918

This table includes only production and only those countries which are more or less involved currently, or potentially, in the bean trade of western Europe and the Americas. It includes the countries of western Europe, western Asia, Africa, South America (excluding Brazil), and North and Central America.

The 1949 production in this group of countries is estimated at 52 million bags--14 percent above the prewar figure of 45 million bags. Adding to the 1949 production the known United States and Turkish carry-over stocks makes the supply in this group of countries almost 27 percent above prewar. This compares with a population increase in the same period of about 10 percent.

Assuming, optimistically, that consumption would increase in these countries in 1949-50 to the prewar per capita levels, there would still remain a surplus at the end of the consuming year of from 5 to 7 million bags. Some of these beans may and could be used in the Far East. On the other hand an offsetting factor to this is that some supplies are coming into the Western market from Eastern Europe.

COMMODITY DEVELOPMENTS

TOBACCOEGYPT'S TOBACCO IMPORTS INCREASE;
EXPORTS OF PRODUCTS DECLINE

Egypt's 1949 imports of leaf tobacco were 17 percent above the 1948 level, according to the American Embassy in Cairo. Exports of manufactured tobacco products in 1949 were below the level of the previous year.

Imports of leaf tobacco in 1949 totaled 29.7 million pounds. This compares with 25.3 million in 1948 and 24.9 million in 1947. Turkey supplied 9.1 million pounds, or about 30 percent of Egypt's leaf imports in 1949, compared with 8.6 million pounds, or 34 percent, in 1948. Greece was the second most important source of leaf, supplying 4.3 million pounds in 1949. Imports from the United States totaled 3.7 million pounds in 1949, compared with 1.9 million in 1948. Other countries supplying substantial quantities of leaf in 1949 include Cyprus, Bulgaria, the Soviet Union, Aden, Iran, India, China, and the countries of Southern Africa.

Cigarette imports in 1949 totaled 1.3 million pounds, compared with 1.9 million in 1948 and 1.4 million in 1947. The United Kingdom supplied over 1 million pounds, or 80 percent of the total cigarette imports in 1949. The 1949 imports of smoking tobacco totaled about 43,400 pounds and cigars about 14,900 pounds. The United Kingdom supplied about 93 percent of the total smoking tobacco imports while the cigar imports came principally from Cuba and the Netherlands.

Cigarette exports totaled only 45,130 pounds in 1949, compared with 157,460 pounds in 1948, and 591,300 pounds in 1947. In addition, Egypt exported about 50,860 pounds of other manufactured tobacco products in 1949. This compares with 104,700 pounds in 1948. Nearly 70 percent of the total exports of manufactured tobacco products went to Saudi Arabia.

COLOMBIA'S TOBACCO PRODUCTION
LOWER; EXPORTS UP

Colombia's 1950 production of leaf tobacco is forecast at about 20 percent below the 1949 harvest, according to the American Embassy in Bogota. Exports of leaf in 1949 were nearly 50 percent above the 1948 level.

The country's production of leaf tobacco during the calendar year 1950 is preliminarily forecast at about 35.0 million pounds, compared with an estimated 43.7 million in both 1949 and 1948. Tobacco is grown to some extent in all of the 15 Departments of Colombia, but the main

centers of production are located in the Departments of Santander and Bolivar. Leaf grown in the Department of Santander is used primarily in the domestic production of cigarettes. However, much of the tobacco grown in the Department of Bolivar is exported. Dark, air-cured, cigar filler types account for the bulk of the leaf produced in that Department.

Colombia's 1949 exports of leaf totaled approximately 9.9 million pounds. This compares with 6.7 million in 1948 and 8.6 million in 1947. It is estimated that in 1949 about 60 percent of the shipments went to Germany, 30 percent to Holland, and the remaining 10 percent to French possessions. It is reported that only about 4.0 to 5.0 million pounds from the exportable part of the 1949 crop remained unsold as of March 31, 1950. At that time it was expected that all leaf available for export would be sold within a short time.

TROPICAL PRODUCTS

INDIA INCREASES EXPORT TAX ON TEA

On May 6, 1950, India increased its export tax on tea from 34 cents to 42 cents per 100 pounds, according to the American Consulate General in Calcutta. This followed an earlier increase in the tea export tax from 29 cents to 34 cents per 100 pounds effective November 6, 1949.

The tax levied on tea exports is credited to the Indian Central Tea Board. The Board recommended that the latest increase of approximately 8 cents per 100 pounds should go to the International Tea Market Expansion Board for the purpose of expanding tea advertising in dollar areas.

India is the world's leading supplier of tea, normally accounting for about half of total world exports. In 1949, India exported approximately 490 million pounds of tea, about 52 percent of world exports of around 950 million pounds.

FATS AND OILS

GUATEMALA'S FATS AND OILS OUTPUT INADEQUATE FOR DOMESTIC NEEDS

Guatemala's 1949 fats and oils production from domestic sources amounted to approximately 9,696 short tons, according to the American Embassy, Guatemala City. This was about 60 percent of the fats and oils available for consumption, the balance having been imported. Imports were the largest in any recent year, due, it is believed, to lower prices

for fats and oils from the United States rather than to any marked change in the availability of domestic fats and oils.

GUATEMALA: Apparent availability of domestically
produced fats and oils in 1949

Commodity	Unprocessed	Oil equivalent
	Short tons	Short tons
Sesame seed	1,500	690
Cottonseed	1,700	238
Corozo	800	500
Tallow	3,868	3,868
Lard	4,130	4,130
Butter	300	270
Total		9,696

American Embassy, Guatemala City.

Based on the 1949 reported hog slaughter, lard production is estimated at approximately 3,750 tons. If the unreported slaughter amounts to at least 10 percent of the recorded slaughter, the over-all production of lard may have been close to 4,130 tons. Hog lard as a cooking fat outranks all other fats and oils in consumer preference. Domestic production, however, is insufficient to cover requirements. During 1949, 2,275 tons were imported from the United States compared with 330 tons, the average of the previous 5 years. Domestic lard sells for 3 or 4 cents a pound more on the local market than American lard. Imports in 1950 are expected to be considerably smaller.

Tallow production is officially reported at 3,868 tons, of which about 47 percent originated in Guatemala City, the location of most of the larger soap companies. Since there is no local demand for edible tallow, practically the total production is used for soap.

Annual butter production is estimated at 300 tons. In the latter part of 1949 imported butter from the United States was underselling the local production by 10 cents a pound. Margarine is not produced in Guatemala. Imports in 1949 amounted to 50 tons.

Sesame is produced on relatively small plots in the Pacific coastal region. Output in 1949 is estimated at 1,500 tons against 2,000 tons in 1948. Seed from the 1948 crop brought farmers 12 cents a pound. By planting time of 1949 the larger oil crushers indicated they would pay only about 5 cents per pound for seed. This marked reduction probably curtailed acreage.

Approximately 1,900 tons of cottonseed were produced in Guatemala in 1949, of which about 1,700 were probably available to crushers. Cotton production has been increasing, largely as a result of the efforts of the Institute for the Development of Production.

Peanuts produced in Guatemala are generally utilized for edible purposes and not crushed. Accurate production figures are not available, but output in 1949 was probably around 250 tons of unshelled nuts.

Production of corozo kernels in 1949 was approximately 800 tons. The word "corozo" is loosely used to designate at least 3 and possibly 5 different types of kernels gathered from wild oil palms, though accurately this term should not be used in connection with palm kernels in Guatemala. Undoubtedly a greater tonnage could be made available but a number of factors tend to hold back the exploitation of the palm fruit.

Practically all the nuts are cracked by hand though there is reported to be a nut cracking machine near Lago de Izabal. Most of the oil palms are located in remote areas outside the commercial land transport network.

Corozo kernels are being offered to oil crushers at \$7 per 100 pounds in contrast to sales at \$10 to \$12 in the fall of 1949. Despite lower prices, production in 1950 may be somewhat greater since there is reduced activity in the El Peten chicle and lumber industries, the major sources of income.

Plantings of African oil palms were made in the Pacific coastal area about 20 years ago, but very little subsequent care was given them. About 5 years ago African palms were planted on both coasts of Guatemala by the United Fruit Company. At Tiquisate in the Pacific coast 893 acres have been planted on lands that formerly produced bananas. Some of the first oil palm acreage on the Pacific coast will reach commercial bearing this year, but the fruit will not be processed into oil. A minimum of 1,500 acres is considered necessary to warrant the installation of oil processing equipment. At Bananera on the east coast 700 acres have been planted to oil palms. This section is probably more suitable for oil palms because of the more evenly distributed rainfall.

Although coconut palms are found growing on both coasts of Guatemala, relatively few of the nuts are processed into copra. From time to time small lots are offered for sale at \$3 per 100 pounds.

Production of seed from the wild cacao voladar tree is roughly estimated at 75 to 100 tons yearly and of castor beans at 250 to 500 tons.

Guatemala has 6 plants with oil crushing equipment. The larger of the two modern plants is located in Guatemala City and has a yearly oil capacity of 3,600,000 pounds.

Foreign trade in fats and oils consists almost entirely of raw materials to supplement deficient domestic production. The United States is the leading supplier of fat materials, furnishing 96 and 98 percent, respectively, of the tallow and lard imports in 1949. Imports in 1950 are expected to be less than in the past year. Exports are negligible.

SOUTH AFRICA'S PEANUT HARVEST DOWN; SUNFLOWER SEED UP

The Union of South Africa's 1949-50 peanut crop is down from the past two years, but the sunflower seed crop exceeds that of last season, according to the American Embassy, Pretoria. Preliminary unofficial estimates place the peanut harvest at 60,000 short tons against 67,000 a year ago and only 12,000 prewar and the sunflower crop at 35,000 tons compared with 20,000 in 1948-49 and less than 2,000 prewar. The only significant change in other oilseeds is the increase in cottonseed. The 1949-50 outturn is estimated at about 8,000 tons compared with 2,000 in 1948-49 and 1,000 prewar.

Production will be sufficient to supply domestic requirements of peanuts and oil and sunflower seed and oil with the possibility of some exportable surplus of sunflower seed oil.

Oil expressors' prices to South African producers for the 1949-50 season for peanuts are based on shelled nuts of grade Q2 quality at L52-10-0 (\$147.39) per short ton delivered free-on-rail at sender's station. The sunflower seed price to producers is the same as the 1948-49 effective price of 20 shillings (\$2.80) per bag of 100 pounds, free-on-rail for the best grade.

Legislation is now being considered and there is a strong likelihood of its passage, for the unlimited manufacture of white margarine. Should this legislation pass, more of the locally produced vegetable oils will be used for the production of margarine and consumed in South Africa. The Ministry of Agriculture through the Dairy Industry Control Board is expected to control the production of margarine to protect the dairy industry if necessary.

LIBYA'S OLIVE OIL OUTPUT REVISED UPWARD

Olive oil production in Libya has been revised upward to 7,700-8,800 short tons, according to the Consulate General, Tripoli. The increase over the 1948 output of approximately 1,700 tons resulted primarily from the following factors: (1) Over 300,000 young trees

(11-15 years), planted during the period of Italian colonization, bore fruit for the first time; (2) the prolonged drought of 1947-48 did less damage to the trees than expected; and (3) the pressing yields showed a marked increase--going from 22 to as high as 40 percent in some cases.

The heaviest production was concentrated in the Homs-Cussabat area of Eastern Tripolitania where 6,000 tons of oil are known to have been pressed, and it seems likely that an additional 1,000 to 2,000 tons may have been produced but not reported.

A shortage of pressing capacity resulted because of the size of the crop. The consequent delay between picking and pressing of the olives caused an increase in the acidity content of the oil.

Production of inedible oil in 1949 was between 700 and 900 tons, of which almost 500 tons are available for export, and the remainder will be consumed locally in soap making.

Local olive oil consumption varies from 2,000 to 4,000 tons per year. The balance of this year's production will be sold abroad, but since this is the first exportable surplus of olive oil in the country's modern history, considerable difficulty has been encountered in establishing trade channels for its disposition.

An estimated 600 - 1,000 tons of oil have already moved or will shortly go to Crynaica, and arrangements have been made to export over 4,000 tons to Italy.

Prices for olive oil sold to Italy were £185 for one lot of 1,000 metric tons (\$470 per short ton) and £170 for any quantity above that (\$432). Both prices are f.o.b. Tripoli for oil under 3 percent acidity and will give the producers 74 to 78 MAL (Military Administration Lire) and 67 - 70 MAL per kilogram (20 to 21 and 18 to 19 cents per pound), respectively. The higher priced oil will be refined and sold in Italy as National Oil while the remainder, amounting to over 3,000 tons, will be taken by Italy as foreign oil for refining, packaging, and re-export.

The 1950 olive oil production at this time promises to equal that of 1949 pending favorable weather. Some of the 2,000,000 trees planted under the Italian agricultural development of Tripolitania are now beginning to bear fruit. Within 10 years, it is reasonable to expect that an annual exportable surplus of 20,000 to 40,000 tons of oil will be available.

The handling of such a surplus will involve a considerable expansion of the present pressing and refining facilities. This will require a sizeable investment of capital, presumably from foreign sources since there is little in the country for such developments.

CHILE'S WAR-BORN WHALING INDUSTRY HAS OFFSET DECLINE IN TALLOW SUPPLIES

Chile's production in 1949 of whale and sperm oil totaled at least 3,660 short tons, according to the American Embassy, Santiago. This volume of output, derived entirely from the catch of land station operations, was about one-quarter less than the tonnage produced in 1948, and about one-sixth less than in 1947. However, production was greater than the 1944-46 average when Chile's whaling industry was in its infancy.

Production of sperm oil in 1949 was considerably greater than the output of whale oil. This was true in previous years for which data are shown except 1948 (see table). Production in recent years has ranged from a low of 2,342 tons in 1946 to a high of 2,942 tons in 1945. On the other hand, output of whale oil--except in 1948 when it reached an abnormally high level of 2,021 tons--has varied from a low of 188 tons in 1944 to a high of 948 tons in 1946.

Chile's whaling industry is entirely in the hands of 2 firms. The larger of these is the Compania Industrial, Valparaiso, a large integrated organization whose whaling activities are an adjunct to its extensive and diversified soap and manufacturing activities. The smaller firm, Macaya y Compania, in Talcahuano, either sells its small output of oil to the Compania Industrial or to local soap factories in southern Chile. The Compania Industrial uses all of its sperm oil and over 90 percent of its whale oil for the manufacture of laundry and toilet soaps, the remainder of the whale oil going into margarine and lard compounds.

The whaling operations of the Compania Industrial were begun during the war to provide substitute materials for tallow and other scarce fats in manufacturing processes. The company's production of whale and sperm oil has offset the loss of tallow imports from Argentina and the decline of tallow production in Magallanes, southernmost province in Chile, and at the same time helped toward maintaining the output of soap at a fairly normal level.

CHILE: Whale and sperm oil production, 1944-49 ^{1/}
(Short tons)

Kind	1944	1945	1946	1947	1948	1949
Baleen..	188	868	948	^{2/}	2,021	795
Sperm...	2,395	2,942	2,342	^{2/}	2,911	2,866
Total:	2,533	3,810	3,290	4,279	4,932	3,661

^{1/} Production of the Compania Industrial only.

^{2/} Not available.

American Embassy, Santiago.

CHILE: Whale catch, by kind, 1944-49 ^{1/}

(Number)

Kind	1944	1945	1946	1947	1948	1949
Baleen.....	55	117	249	121	373	230
Sperm.....	305	360	336	669	681	680
Total.....	360	477	585	790	1,054	910

^{1/} Catch of the Compania Industrial only.

American Embassy, Santiago.

WHALE AND SPERM OIL PRODUCTION FROM 1949-50

ANTARCTIC PELAGIC CATCH LESS THAN PREVIOUS SEASON

Production of whale and sperm oil from the Antarctic pelagic whale catch in the 1949-50 season, totaling 375,817 short tons (see article and table in Foreign Crops and Markets, May 15, 1950), was slightly less--about one percent--than the output of the previous season. According to final data received recently by the Office of Foreign Agricultural Relations, production of whale and sperm oil in the 1948-49 season totaled 379,765 tons.

There were 18 expeditions representing 6 countries that took part in the Antarctic whale hunt in the last two seasons. (See table on following page).

Production of whale oil from the 1949-50 catch totaled 351,643 tons, about 2 percent more than the output from the previous season's catch. Sperm oil production, however--totaling 24,174 tons from the 1949-50 catch--was down one-third from the year before.

The combined production of whale and sperm oil was approximately the same in each of the last 2 seasons for Norway. The Soviet and Japanese expeditions, however, had an increased output this last season as compared with 1948-49 whereas the British, South African, and Dutch fleets had a decrease in their oil production from the previous season.

ANTARCTIC PELAGIC SEASON 1948-49

Country	Expeditions	Whale oil	Sperm oil	Total
	<u>Number</u>	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>
Norway.....	10	174,714	21,308	196,022
United Kingdom.....	3	90,801	8,893	99,694
Un. of So. Africa.....	1	24,901	5,102	30,003
The Netherlands.....	1	19,697	808	20,505
U.S.S.R.....	1	1/ 11,260	-	11,260
Japan.....	2	22,281	-	22,281
Total.....	18	343,654	36,111	379,765

1/ Calculated.

Norwegian Whaling Gazette, Sandefjord, Norway.

COTTON AND OTHER FIBERCOTTON-PRICE QUOTATIONS
ON WORLD MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, and the
U.S. gulf-port average

Market location, kind, and quality	Date 1950	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
<u>Alexandria</u>		: Kantar	:	:	:
Ashmouni, Good.....	5-25	: 99.05 lbs.	: Tallari	:	(not :quoted)
Ashmouni, F.G.F.....	"	: "	: "	:	(not :quoted)
Karnak, Good.....	"	: "	: "	:	76.95 : 44.61
Karnak, F.G.F.....	"	: "	: "	:	70.95 : 41.13
<u>Bombay</u>		: Candy	:	:	:
Jarila, Fine.....	"	: 784 lbs.	: Rupee	:	620.00 : 16.50
Broach Vijay, Fine.....	"	: "	: "	:	690.00 : 18.37
<u>Karachi</u>		: Maund	:	:	:
4F Punjab, S.G., Fine....	5-24	: 82.28 lbs.	: "	:	75.00 : 27.50
289F Sind, S.G., Fine....	"	: "	: "	:	77.00 : 26.23
289F Punjab, S.G., Fine...	"	: "	: "	:	80.50 : 29.52
<u>Buenos Aires</u>		: Metric ton	:	:	:
Type B.....		: 2204.6 lbs.	: Peso	:	:
<u>Lima</u>		: Sp. quintal	:	:	:
Tanguis, Type 5.....	5-24	: 101.4 lbs.	: Sol	: 1/ 380.00	: 25.11
Pima, Type 1.....	"	: "	: "	:	(not :quoted)
<u>Recife</u>		: Arroba	:	:	:
Mata, Type 4.....	5-25	: 33.07 lbs.	: Cruzeiro	:	190.00 : 31.26
Sertao, Type 5.....	"	: "	: "	:	(not :available)
Sertao, Type 4.....	"	: "	: "	:	235.00 : 38.66
<u>Sao Paulo</u>		:	:	:	:
Sao Paulo, Type 5.....	"	: "	: "	:	196.00 : 32.25
<u>Torreon</u>		: Sp. quintal	:	:	:
Middling, 15/16".....	"	: 101.4 lbs.	: Peso	:	240.00 : 27.37
<u>Houston-Galveston-New</u>		:	:	:	:
Orleans av. Mid. 15/16"...	"	: Pound	: Cent	:	XXXXX : 32.98

Quotations of foreign markets reported by cable from U.S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

1/ Nominal.

